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## Customer Support & Relations Management

**Duration:** 102 hours (including 40 hours of field work)

**Prerequisites:** Basic personal computer skills and basic Internet knowledge.

**Description:** Exceptional customer support can mean different things to different people, but at the heart of it, it's solving for your customer. This course will expose students to many different concepts and skills to ensure that students have a well-rounded understanding of customer support and other aspects of business, so that effective problem solving and customer service can be provided in many types of job environments.

In addition to covering "soft skills" such as critical thinking, time management, and general understanding of the sales process, during the course students will also spend a significant amount of course time learning about and working with Customer Relationship Management (CRM) software, to gain practical experience with real customer management software so that they will be more confident when they need to use similar software in their future jobs. CRM allows users to navigate many aspects of customer support, such as technical support case management, providing dashboards to let an employee know if certain tasks still need to be completed, viewing purchase histories, and internal communications. This particular course will utilize HubSpot CRM software, and having prior experience with many of the tasks performed in class, such as support ticket creation, will be useful no matter what brand of CRM software a student will wind up using in their future workplace. Many positions in the workforce also use CRM, even if they don't have phrases like "Customer Support" or "Customer Service" in the job title. For example, advanced technical support positions often use CRM software as they manage progression and resolution of customer technical support issues and bug tracking. Sales positions also use CRM in some form to manage various stages of the sales process with a customer.

The course also includes 40 hours of practical field work, in which the student can observe and participate in actual support situations. Students will be given the opportunity to experience real world business protocol training at corporations with different CRM systems. This will include training in authentic business environments, while learning different types of help desk and customer service communication procedures. Students will learn how to analyze and identify problems, and then will be taught how to propose one or more solutions in a variety of industries. Putting concept into practice is always a valuable

component in the learning process, and being able to apply what they've studied during class and encountering unexpected situations and resolving them in a managed environment will better prepare students for future scenarios in their ensuing workplaces.

## Course Overview

### Introduction to Customer Support

- Course Roadmap

### CRM Software and Configuration

- Understanding CRM and Help Desk
- Setting Up Conversations & Messages
- Setting Up Tickets
- Setting Up a Knowledgebase
- Setting Up a Customer Portal
- Setting Up Customer Feedback
- Setting Up Reports and Analytics

### Understanding the Sales Process

- Inbound Sales Fundamentals
- Prioritizing Active Buyers over Passive Buyers
- Earning the Attention of Today's Empowered Buyer
- Understanding the Buyers Context
- Delivering Personalized Sales Presentations
- Prospecting and Closing Sales
  - Identifying Good Fit Leads
  - Connecting With Your Contacts
  - Closing Sales

### Delivering Exceptional Customer Support

- Understanding Customer Support Competencies
- Framework of a Support Case
  - Issue Discovery
  - Troubleshooting and Consultation
  - Resolution and Impact
- Managing Your Time as a Support Rep

### Inbound Service Fundamentals

- Guiding Customers to Good Outcomes
- The Customer Experience and Meeting Expectations

### Critical Thinking and Problem Solving in the Workplace

- Critical Thinking Foundations
- Critical Thinking in Action
- Effective Problem Solving
- Strategic Decision Making

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